



Professor Brett Kenneth Davies

CTA, AIAMA, BJuris, LLB, Dip Ed, BArts(Hons), LLM, MBA, SJD

Barrister and Solicitor of the High Court of Australia

Accredited Mediator (AIAMA)

Chartered Tax Adviser (CTA)

Adjunct Professor Curtin University Business & Law School

Curriculum Vitae

Curriculum Vitae of Professor Brett Kenneth Davies
 CTA, AIAMA, BJuris, LLB, Dip Ed, BArts(Hons), LLM, MBA, SJD
 Adjunct Professor Curtin University Business & Law School

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Date of Birth 17 August 1960 (Australia)
Marital Status Married, with a son
Citizenships Australian and British

Education

- **Doctor of Juridical Science**, 2013, The University of Western Australia
- Practitioners Certificate in Mediation and Conciliation (AIAMA), Institute of Arbitrators & Mediators Australia, 2012
- **Master of Business Administration**, 1996, Murdoch University, Western Australia
- **Master of Laws**, 1992, The University of Western Australia
- **Bachelor of Laws**, 1987, The University of Western Australia
- **Bachelor of Jurisprudence**, 1986, The University of Western Australia
- **Diploma of Education**, 1983, Nedlands Teachers College, Western Australia
- **Bachelor of Arts (Honours)**, 1982, The University of Western Australia
- Graduated, 1978, Ceredo-Kenova High School, West Virginia, USA (Rotary Exchange)
- Matriculated, 1977, Tuart Hill Senior High School, Western Australia

Professional



LAW CENTRAL

- Founder, Legal Consolidated Barristers & Solicitors (Australia) 2015 - **current**
- Founder, Legal Consolidated Ltd (UK) 2013 - **current**
- Founder, Integrated Legal Holdings Ltd, 2nd listed law firm in the world, 2007 (ASX)
- National winner of Service Excellence in Professional Services Firms by Customer Service Institute of Australia, 2010
- Founder, Fortuna Funds Management Ltd, 2003 - 2010
- Founder and Managing Director, Law Central Co Pty Ltd, 2000 - 2012 (listed 2007)
- Non-Executive, Director, eTick Limited, 2002 (Australian Stock Exchange) - reconstruction
- University of Western Sydney, Lecturer in taxation and insurance law for the Master of Commerce, 2000 - 2005
- Curtin University, Lecturer in Estate Planning for Bachelor of Commerce and Master of Financial Planning 2000 – 2005, 2016 — **current**; Curtin Business School Advisory Board 2003 - 2005
- Partner, Brett Davies Lawyers 1994 - 2012 (53 staff) (in 2011 renamed to Civic Legal)
- Barrister & Solicitor, Birman & Ride, Barristers & Solicitors, 1990 - 1994
- Articled Clerk & Barrister & Solicitor, Robinson Cox, Barristers & Solicitors, 1986 - 1990
- Real Estate Representative, Mair & Co, 1982 - 1984 (while full-time student)

Community



- **Art Gallery of Western Australia** Chairperson, Foundation: 2004 - 2007, Fund Raising Committee 1999 - 2007; Councillor 2002 - 2008; Foundation life member - **current**
- **The Friends of the Art Gallery** President 1999-2001; Councillor 1993- 2002
- **Library Board of Western Australia**: 2009 - 2012; Policy & Planning and Audit committees
- Western Australia Limb Service for Amputees Advisory Council 2004 - 2013
- St Bartholomew's House for Homeless Men, Council, 1991 - 2003 (Finance 1999-2003)
- Rotary Club East Perth, 1996 - 2008, Director Community Services, Sergeant, President
- Customer Service Institute of Australia, Chairperson, 1999 - 2007
- Sir Charles Gairdner Hospital's Art Advisory Committee, 2001 - 2004
- Honourable Order of Kentucky Colonels, 1978, awarded by the Governor of Kentucky

Committees

The Law Council of Australia

- * Business Law Section Executive, 2007 - 2012
Chair Membership, 2009 - 2011; Privacy Committee Liaison 2010 - 2012
- * Australian Law Management Group, National Chair, 2001 - 2004
Committee, 1997 - 2007; Editorial 1997 - 2007
- * Legal Practice Section, Councillor 2000 - 2006, Treasurer 2004 - 2006
- * Taxation Committee (Western Australia Chapter), 1997 - 2012
- * Young Lawyers Section, National Councillor, 1988 - 1991, Treasurer, 1991

The Law Society of Western Australia - Committees:

- * Graduate and Academic Standards, 2007 - 2012, Deputy Convenor 2009 - 2010
Convenor 2010 - 2012
- * Law Office Management, 1996 - 2012, Deputy Convenor, 1998 - 2012
- * Taxation, 1996 - 2012
- * *ad hoc* Exit Survey, 1999 - 2000 (research on why lawyers leave the profession)
- * Conveyancing, 1992 - 1993
- * Corporate Lawyers, 1991 - 1992
- * Professional Conduct, 1991
- * Summer School, 1989 - 1990
- * Education, 1988 - 1990
- * Equity Advisory Group, 1988

Legal Practice Board of Western Australia, 2006 - 2008

- * Management Committee, 2006 - 2008
- * Professional Affairs Committee, 2008
- * Legal Practitioners Complaints Committee, 2006 - 2007

Fellow (Chartered Tax Adviser, CTA) of the Taxation Institute of Australia, 1997 - current

- * Expert Assessment Panel 2016 - **current**
- * State Membership Committee 1999-2003; 2010 - 2012
- * State Education Committee 2001-2006, State Council 2005 - 2012
- * Discipline Committee 2010 - 2012
- * National Membership & Services Committee 2005 - 2012

The University of Western Australia:

- * Standing Committee of Convocation, 1988 - 1993, 2016, - **current**
- * President, Part Time & Mature Aged Students Association, 1986 - 1988
- * The University of Western Australia Hall of Residence, 1985 - 1989

Tutoring: Law, English & Economics **Committees:** Council, Discipline, Hall

Books

- Chapter author of the *Australian Financial Planning Handbook*, Thomson (all 7 editions)
- Curtin Business School, Estate Planning Unit Guide and Text Book
- Zurich Business Succession Planning Text Book
- Cheers, *A Guide to making authentic Aussie Beer*, 1976 (16 years old)

Activities

- The Royal Commonwealth Society, Bath UK Chapter 2012 - **current**
- Perth Flying Squadron Yacht Club, Member 2006 - **current**
- The Western Australia Club and Navel & Military Club 2000
 - * Board 2000 - 2012; Chair of House 2004 - 2007
- First group of law firms to achieve WA Law Society Quality Practice Standard, 1997
- Peter Newman's Breakfast Lawyer on radio station 6PR, 1994 - 1995
- Barrister & Solicitor, Supreme Court, 1988 and High Court of Australia 1989 - **current**



Brett Kenneth Davies

Publications List

Conference Presentations

1. *Legalwise Estate Planning and Superannuation Conference*, two-day Chairperson, commentator and delivery *Accountants Exemption and Licensing*, Perth, 28-29 October, 2016
2. *Legalwise Seminars Wills and Estates*, Chair and Panel Member, Parmelia Hilton, Perth, 13 September 2016
3. *Business Succession Planning for the busy financial planner*, ANZ Financial Planning Commercial Team, South Australia, 14 July 2016
4. *Accountant's Concession for Superannuation Advice*, Wealth Wise, West Leederville, Western Australia, 1 December 2015
5. *Re-organising the regulatory landscape - competition, standards, accountability and consumer protection - an International Perspective*. Sharing panel with Baroness Hayter of Kentish Town, Shadow Spokesperson, Business, Innovation and Skills and Cabinet Office. Chaired by Rt Hon The Lord Hunt of Wirral, Westminster Legal Policy Forum Keynote Seminar: *The future of Legal Services Regulation*, London, 4 September 2011
6. *Innovation in the legal services market - growth, skills and emerging business models*, Panel with Lord Brennan QC, Vice-Chair, All-Party Parliamentary Group for Legal and Constitutional Affairs and Jonathan Djanogly MP *et al*, Westminster Legal Policy Forum Keynote Seminar, Glaziers Hall, London, 11 March 2014
7. *Getting your Business Property into Superannuation for no Stamp Duty, Capital Gains Tax or Fringe Benefit Tax*, RSM Bird Cameron Chartered Accountants National Partners Conference, Melbourne, 5 April 2011
8. *Advanced Succession Planning Strategies with Superannuation*, RSM Bird Cameron Chartered Accountants, Joondalup Country Club, 15 February 2011
9. *Strategic Planning for Professional Service Firms*, Adelaide Club, South Australia, 2 December 2011
10. *Asset Protection for Barristers and Lawyers*, Wojtowicz Kelly Legal, Perth, 17 November 2010
11. *Strategic Planning for the rural Accounting Practice*, Jones Middleton Bizmentor, Margaret River, 5 November 2010
12. *Business Overseas – Best Practice and Best Vehicle*, Law Society Office Expo, Perth, 26 October 2010
13. *Advanced Asset Protection*, Cambridge Street Accountants, Perth, 1 October 2010
14. *Business Structures for Businesses Going Overseas*, Athenaeum Club, Melbourne, 16 September 2010
15. *When CRM becomes part of the Strategic Plan*, Integrated Legal Holdings, Coolangatta, 10 September 2010
16. *Asset Protection – New Strategies using offshore Vehicles*, Queensland Club, Queensland, 9 September 2010
17. *Asset Protection and Offshore structures*, Commonwealth Club, Canberra, 16 June 2010

Publications

18. Why the worry with Service Trusts? (with A Conway-Mortimer); *Weekly Tax Bulletin* 18 Feb 2011, Thomson Reuters, paragraph: 198
19. Family Trusts and streaming a life after *Bamford*: *Weekly Tax Bulletin* 28 Jan 2011, Thomson Reuters, paragraph 107
20. The Future of trust distributions post-*Bamford*, *Financial Planning*, Volume 22, Issue 11,

Dec/Jan 2011, pages 15 - 17

21. *Australian Financial Planning Handbook*, 2010-11, (with JK Day *et al*), Chapter author, Thomson Reuters (all editions, 2005, 2008; 2009, 2010, 2012), ISSN 1448-1936
22. Gearing self-managed super funds: key changes, *Financial Planning*, Volume 22, Issue 10, Nov 2010, pages 36-37
23. *Sure, no one likes time billing – but what are the alternatives?* (with K Dunmill), Law Council of Australia, 36th Australian Legal Convention, Perth - 2009
http://www.lawcouncil.asn.au/shadomx/apps/fms/fmsdownload.cfm?file_uuid=CB52B725-1E4F-17FA-D22A-A06F1F3CCE1C&siteName=lca
24. *Asset Protection for Spouses*, Taxation Institute State Convention, Margaret River, 2006
25. *Asset Protection and Trusts – A Strategic Approach*, MLC Conference, Sydney, 2005

26. *Estate Planning, Asset Protection and Self-managed Superannuation – A strategic Approach*, Apogee Financial Planning, Darwin, 2005
27. *Business Succession Planning – this time it is for the Accountant*, The Institute of Chartered Accountants, Perth, 2004
28. *Advanced Strategies on Growing a Professional Service Business*, Epic Asset Management PD Day, Perth, 20 September 2002
29. *Tax Reform – is there light at the end of the Tunnel*, CPA Congress 2002, 16 May 2002
30. *Succession Planning – an untapped market opportunity for the professional Risk Adviser*, Association of Financial Advisers National Conference, Gold Coast, Queensland, 28 October 2001
31. *Advanced Estate Planning Strategies for Business and Families*, Associated Planners Financial Services, Sydney, 13 September 2001
32. *Keeping it in the Family – Discretionary Trusts*, The Law Society, 19 September 2001
33. *Succession Planning Strategies*, Association of Financial Advisers National Conference, Gold Coast, 29 October 2001
34. *Cradle to Grave, Are you the Centre of the Universe? – A different Vision of Strategy for the Financial Planner*, Colonial Funds Management, Sydney Cricket Ground, 5 July 2001
35. *Planning for Centrelink Changes*, Taxation Institute, Perth, 14 June 2001
36. *Tax Effective Retirement Strategies*, (with P Nitschke and P Jagiello), Institute of Chartered Accountants, Perth, 12 June 2001
37. *Moving your Law Firm Online*, (with J Styles), Practice Management Journal, pp 15-16, May 2001
38. *Identifying Business Opportunities Overseas*, Aon Financial Advisers, Perth, 20 March 2001
39. *Business Structures that will last the Distance* (with P Nitschke), Institute of Chartered Accountants, 26 April 2001
40. *International Business - Planning to Take Over the World*, Financial Wisdom Conference, Singapore, June 2001
41. *Zurich Business Succession Planning Text Book*, Zurich Financial Services, 2002
42. *Estate Planning Unit Guide and Text Book*, Curtin Business School, 2001
43. *Business Succession Planning Course*, (2 day course) Norwich Union, Perth, August 2001
44. *Tax Effective Retirement*, The Institute of Chartered Accountants, Perth, July 2001
45. *Business Succession Planning*, Norwich Union, Perth, 2001
46. *Estate Planning on an International Arena*, Colonial Financial Services, Queensland, 9 February 2001
47. *Customer Service for the Professions, Customer Service Excellence 1998* (with R Sinnott), pp 75-82, ISBN 0 9586 18100
48. *Computer Crime, Computer Excellence* (with B Whitford *et alia*), Beaumont Publishing House, 1991, pp 456-458, ISBN 0646 01506